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INFLUENCE OF BROADCASTING OF SPORTS EVENTS ON THE DEVELOPMENT OF TELEVISION INDUSTRY

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Abstract: The industry of sports has become one of the most profitable global industries and live broadcasting of sports events has proved to be the most wanted TV programme. There was a time of linear TV emissions, when the contents used to be available exclusively on TV sets, for free, live and only on official national emitter programmes, while nowadays these contents are followed by the viewers via all available platforms and devices, quite frequently for certain additional fee. Sport broadcasting has become globally available at any moment and at any place, both live and delayed, and licence rights are the mighty instrument in the media game. The development of technology and overall media industry is directly linked to the development of the industry of sports through technological advances regarding content placement, the development of new business models and marketing placement. Due to possible budget limitations, exorbitant prices of licence rights concerning the broadcasting of international sports events and the legislation not protecting our national interest in terms of the contents available free of charge to all the citizens, public media services are rather often likely to lose in this race to specialised sports channels whose baseline business models are founded on none other than live broadcast. The research will be conducted using the methods of induction, deduction, analysis and synthesis, as well as the comparative method.

Key words: TV programme, sports broadcast, live broadcast, licence rights, TV industry.

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Introduction

The trademark and essence of the TV industry since its very beginning is the so-called television spectacle, that is, media that links audience and an ongoing event. Thus, live broadcast enables the viewing audience to be an indirect eyewitness of the program content organized in studio facilities or an event that takes place at the same time elsewhere. It is the bridging of time and space distance in a live broadcast that makes television the most attractive media, even after almost nine decades since the beginning of regular broadcasting of television programs. Its linearity in a live broadcast, through creating a sense of presence, has a special effect in following major sports events, which, due to the development of technology in the distribution of programs, became global television broadcasts, accompanied by strong emotions.

"Sport evokes incredibly strong emotions in its supporters; pride, sense of belonging, hope, excitement - but also despair, frustration and anger. Fans want to live in the moment with these emotions, feeling them as they occur, along with thirty million people around the world they're connected to at that moment". (Mainstreaming TV)

The production and distribution of live broadcasts is expected to be impeccable. TV signal delay or other interference are not perceived as technical problems. A viewer's experience is emotional. Improving the viewing experience is one of the strongest motivations for the development and implementation of modern technology in the production of sports broadcasts.

Also, great interest in the so-called sportcasts, i.e. sports broadcasts, stimulated the media struggle for acquiring sports rights and, in particular, the development of specialized television sports channels. There is interest of the media themselves in providing broadcasts on the one hand, and audience that yearns for an ever-increasing amount of sports content on the other, and at the same time it is not only the popularization of sports the sports industry sees in the availability of sports events on television – it is, first and foremost, money.

"Actually, it is a closed circle that consists of sport - money - program. Sport, especially the top-class sport, needs money to provide all the necessary prerequisites for achieving such results. Sport generally gets its money from sponsors, and these in turn need media promotion in order to realize part of the profit through their core activities, which they allocate for sport. Media depends on ratings, so they need a high-quality and attractive program to gain prestige and sport, especially top-class, is highly valued "goods". Therefore, the goal of sport is the result, money wants profit, and media has circulation (ratings). If they are well connected, everybody wins!" (Božičković, 2000)

This is what Veselin Grozdanić, the famous director of TV Belgrade, who directed more than five and a half thousand live broadcasts during his professional career, most of

which were sports events, stated in an interview for the Politika newspaper in 2000. The same formula applies today. Sports that bring in the most profit are the most represented on TV - football, basketball, tennis, then handball, volleyball, cycling, but championships in gymnastics, rowing, etc. are less watched. According to the Ipsos survey, carried out during the 2022 World Cup in Qatar, as many as nine out of ten respondents watched the matches at home, and 92 percent of the respondents were informed about the events in Qatar via television. (Ipsos, 2022)

Due to a better position in the TV schedule, a good time slot, potentially bringing a good share and rating, i.e. high rating results, sports events are often adapted to media requirements. That is why the start of the match coincides with the content in the most watched evening slot, so-called "prime time". This also happens on television programs with national coverage in case of a possible overlap between two sports events, so that one of them, less important according to the editor's opinion, does not get transferred to another channel with lower ratings, which means less income from sponsors and advertising.

There is also a well-known case occured during the 31Summer Olympics in Rio: the marathon took place in the hottest part of the day, due to live broadcast on television in its entirety. Cases like these show that ratings and placement first and foremost on so-called national *mainstream* media are the most important to the organizers of sports events.

This paper will focus on the impact of sports on the development of the media market and the TV industry itself, which recognizes sports as the biggest motivationh for applying innovations and attracting viewers.

Sports broadcast - from analogue to digital image

Broadcast of the XI Summer Olympics in Berlin in 1936 was the first television live broadcast of a sports event. It was made with three cameras only to nearby technically equipped rooms, and as many as 162,000 viewers followed the live TV broadcasts.

At the first subsequent Summer Olympic Games, held in London in 1948, the BBC produced live TV broadcasts that could only be watched in the city. This was preceded by the first sports TV broadcast in Great Britain - the tennis match between Bunny Austin and George Rogers at Wimbledon in 1937. The broadcast, which lasted 25 minutes, was carried out with two BBC cameras. Those were connected by cables to a smaller production unit located in the parking lot, from which the signal was transmitted to the central building of the British media public service. Other broadcasts that year also lasted for about half an hour. Today, the main field is covered

by 18 cameras, broadcasts are followed by more than a billion viewers in over 200 territories around the world. (Kirkham, 2015)

The first live sports broadcast in Yugoslavia was carried out by TV Zagreb in 1959. It was the broadcast of the football match between Yugoslavia and Italy, ended with a score 4:1, and the commentator was the legendary sports journalist Mladen Delić. The first OB van arrived to Belgrade in 1961. It was a black and white RCA with four cameras. TV Belgrade broadcast live for the first time the same year. Viewers could watch the eternal derby between Red Star and Partizan on their TV sets.

"The broadcast of the match was carried out from the great hall of the Belgrade Fair, where the final of the European Basketball Championship between Yugoslavia and the USSR was played the same year in the adapted area in front of a record number of 25,000 spectators, which the Russians won with a minimum advantage. The first television commentators of a football the eternal derby between Red Star and Partizan were the late Vladanko Stojaković and the current doyen of sports broadcasting Marko Marković, then a rookie reporter." (Ilić, 2014)

TV Belgrade continues with successfully produced TV broadcasts, such as broadcasts from the European Athletics Championship 1962 held at the Partizan Stadium, formerly JNA stadium.

At that time, the distribution and the receiver base was limited, but over time the number of TV sets increased. Sports broadcasts were especially enjoyed by viewers with color TV in the mid-seventies, because the 1966 FIFA World Cup England was the first cross-border color television coverage of a sports event. Two years later, the Summer Olympics in Mexico also had color coverage. At that time, the color production technique became the standard for broadcasting international sports events, so in 1972, for example, TV Belgrade took over the broadcast the FIBA European Cup Winners' Cup from the Greek national television, which was not technologically ready to fulfill the requirements. Greece did not have color television, so the team from Belgrade broadcast the final of the European Basketball Championship between Crvena Zvezda and Simmenthal. According to the testimony of the director Zvonko Simonović for the show "Trezor - Conversation of Veterans, Belgrade School of Live Broadcasts"²¹, TV Belgrade, from the very beginning, carried out direct broadcasts with three lenses (wide, normal and telephoto). This confused the English, who were already working with nine cameras at that time. He said that they couldn't believe how skilled our cameramen were in changing lenses and how such a virtuoso broadcast could be made with only three cameras. By the way, people interested in

²¹ Trezor - Conversation of Veterans, Belgrade School of Direct Broadcasts", part two. Host Kamenko Katić. Broadcast: August 25, 2006

sports remembered the match for the fight a few seconds before the end of the match. "The delegate asked for a recording of the match, but Nebojša Popović, who was then the Editor-in-chief of TV Belgrade, responded that the match was broadcast live and that there was no recording." (Dapčević, 2018)

While TV Belgrade had several tape recorders (devices for recording and reproducing image and sound) at that time, the OB vans for broadcasts did not have one and therefore there was no video of the match. This and other demands from the sports industry influenced the equipping of television stations with additional resources, modernization and keeping up with technical and technological innovations.

Thanks to the skill of the television creators of TV Belgrade, the so-called Belgrade School of Television Broadcasts was created at that time. The special feature of this school was the readiness, resourcefulness and desire to produce top-quality television broadcasts of sports events with equipment that was far scarcer than the production capacities of large media companies at the time. One of the methods for gathering information for the research was an expert interview with the director Veselin Grozdanić, who has been engaged in the production of live broadcasts of sports events since 1978. According to him, the Belgrade School of Live Broadcasts was promoted in the early 1970s with the broadcasts of 1973 FINA World, the final of 1972/73 European Cup, 1973 World Women's Handball Championship, then 1975 FIBA European Championship, Men's and Women's European Volleyball Championships, etc. He also said that the production teams of TV Belgrade drew attention thanks to the exceptional expertise with which they produced the aforementioned championships. They are especially characterised by their understanding of the sports played, precision and creativity in visual presentation, as well as the gift of evoking the atmosphere of the competition, the specific emotions of the competitors, but also of the audience at the sports arenas. He concluded that the essence was in the expert use of technical tools and the choice of people who used them. Thus, the Belgrade School of Live Broadcasts (and not only sports), thanks to fantastic directors, cameramen, video mixers, sound masters, producers, engineers and technical teams, established supremacy, not only in former Yugoslavia (JRT), but also around the world, because the quality and uniqueness of those broadcasts were outstanding: camera positions, types of lenses, shooting angles, sound and sound effects, types and positions of specific microphones, then there are tape recorders and the philosophy of their use, the dynamics of cutting frames and the way of transitioning from one to another, a sense of proportion and the ability to express the image emotions.

The skill of immediate adaptation to unforeseen situations where decisions are immediate and the consequences unforeseeable was especially important. In the 1980s, according to Grozdanić, with the best intention of not falling behind, the other

TV centers in Yugoslavia accepted the best experiences of TV Belgrade. TV Ljubljana and TV Zagreb progressed most. In those years, there was exceptional professional courtesy in exchange of experiences and knowledge among the employees of the TV stations of the Yugoslav Radio and Television, directors in production, and engineers in technology. The biggest joint project of direct broadcasts of sports events was the XIV Winter Olympics in Sarajevo in 1984, where TV Belgrade broadcast the bobsleigh and luge competitions from four OB vans and 17 cameras.

Requirements became more complex over time, new technologies were adopted. From analogue to digital image. The first SDTV standard was promoted in 1982, and the HDTV high-definition image standard was adopted in 1990 by the ITU — International Telecommunication Union.

"Standard Definition Television, SDTV, is a type of digital television that can transmit and produce images of better quality than standard analogue broadcast. SDTV usually has a resolution of 720x576i or 720x480i. Although SDTV is far from HDTV in terms of quality, compared to conventional (analogue) television it is superior." (Petrović, 2019, p. 10).

The most complex sports broadcast that Radio-television of Serbia produced in HD technology was the 2017 European Indoor Athletics Championship in Belgrade. The main director of the broadcast was Veselin Grozdanić, who stated in the interview for this work, "I prepared the project, with regular work, for whole two years - from the previous European Indoor Athletics Championships in O2 Arena in Prague in March 2015 to March 2017 and Štark Arena in Belgrade. The project was produced with seven OB vans, 52 cameras and 367 crew members. Why is this the most complex project that RTS has ever completed in its history? Because the European Athletics Championship takes place in five disciplines at the same time (four technical disciplines and one running). We simultaneously produced seven different signals (broadcasts): one from each technical discipline, a special broadcast followed the races, we produced a unilateral program for the domestic RTS audience, and finally an international broadcast that is a compilation of all the abovementioned."

Digital production of content has brought numerous novelties - cameras for under-water filming, filming from a drone, cameras on helmets, delayed playback of content that is available in the same second after recording on servers, as well as the possibility of slow motion (slow motion, super slow motion and ultra super slow motion), etc. With high-definition image quality, as well as 2K, 4K and 8K image resolution⁴, which is even more perfect, viewers have received over time a complete experience from the sports broadcast, which makes the sports event itself even more realistic for them, as if they were attending it in person, without having media as a link. It is precisely the sensitivity tests of the latest generation TV cameras that are performed, among other things, for the needs of recording the most demanding sports broadcasts, where the camera must re-

cord even the smallest moving details. Thanks to this, the viewer can see the perfection of the water droplets during, for example, the broadcast of a water polo match.

Modern tools are in digital format. The most diverse types of cameras are in use with increasingly better performance - they differ in format, size, the optics they use, etc. Almost all image and sound signals use wireless contact with OB van direction, graphic packages and information systems have a wide range of possibilities, broadcasts are made using 3D technology. There are no technical or technological limitations, only new tools, such as, for example, the use of virtual graphics. Thus, the "CyberSport program (Orad company) enables the introduction of 3D graphics and animation into the live broadcast of a sports event. Regardless of camera's placement, the inserted object will maintain its position and give the illusion that it is an integral part of the field. The improvement to the broadcast of the sports event is achieved by inserting 2D/3D graphics, animations and videos related to the sports field (e.g. sponsor logo, audience reactions...).²²

One of the latest tests applied during the broadcast of a water polo match is related to the use of drones. The broadcast of the match between the French clubs Strasbourg and Reims with a camera located behind the goal and transmitting footage from the air, according to the organizers, had footage that had never been seen before at water polo matches. This experience is considered refreshing and promising. Time will tell if it will be widely used in broadcasts of this sport.

"This could allow a viewer to see movements that are often difficult to capture with cameras located on the stands or near the pool. This could also attract a larger audience to water polo and make it more enjoyable to watch." (Total Water Polo, 2023)

This example confirms the claim of director Veselin Grozdanić that the biggest challenges in the production of sports broadcasts used to be the number and type of cameras available for a specific project, cable lengths for longer distances, the capacity of OB vans, types and quality of image and sound recorders, the way of signal transmission from the recording site to the OB van or studio, and the biggest challenge today is creativity and its limits.

²² The first OB van with 8K UHD technology was promoted during the XXXI Summer Olympics i Rio, in 2016. Prva reportažna kola sa tehnologijom su promovisana tokom Letnjih olimpijskih igara u Riju 2016. This technology brings picture quality that is sixteen times better than full HD technology. These accessories can be adapted to specific sports and precise trajectories using mechanical sensors. Thus, a digital image, advertisement, logo, video and virtual screen can be inserted into a recording or a live program." (Dugalić, 2018)

Media struggle for sports broadcast

Modern television viewer is far more demanding than the viewer of sports TV broadcasts in the analogue era. He wants the broadcast of his favorite sports event to be available not only in his mother tongue, but also at any time in any place, with the possibility of delayed viewing.

The development of streaming platforms, available on smart devices, enabled personalized access to content. The development of digital services and HbbTV hybrid television created the conditions for the availability of additional information accompanying a sports event - statistics about the match, players, etc. Over time, the segmentation of the viewing audience took place, i.e. there was a need to follow one program type in one place. The media industry responded to the demand launching specialized theme TV channels.

"The first satellite and cable specialized sports channels began to appear way back in 1976, when Cablevision Sports 3 was launched, and it changed its name to SportsChannel in 1979 (today's MSG Plus). The same year, yet another American cable sports channel, ESPN (Entertainment and Sports Programming Network), was created. A decade later, in 1989, Eurosport was launched. The first sports television in Serbia, the SOS Channel, was created in 1995. It broadcast only domestic sports programs. It was shut down in 2018, and the sports TV channel SOS Kanal Plus was created. In the first years of 21st century, in 2006, the first domestic sports cable TV channel, Sport Club, began broadcasting, and in 2010, sports fans got the first sports channel from the Arena Sport package. The youngest channel in this package is Esport - specialized in broadcasting gaming and electronic sports." (Ćitić, 2021)

The dominant content on these channels are live broadcasts, which, due to placement on a spatially limited market, through one or several cable systems, prevent other viewers in the country from having the opportunity to follow the sports event. In Serbia, live broadcasts of important sports events are most represented on the programs of the Public Broadcasting Radio Television of Serbia, which has national coverage, as well as on the programs of the cable sports TV channels Arena, Sport Club and the largest European sports satellite network Eurosport. Due to the limited availability of cable TV channels, i.e. the fact that they are not available to all viewers on the territory of Serbia, the most important international and national sports events should be broadcast on the program with national coverage, which is often not the case. This situation has led to a kind of deregulation of the media market, i.e. disregard of the rules that control economic activity in order for market forces to determine levelling of supply and demand. Globally, sponsors sometimes withdrew from sponsoring sports for which the viewers were not interested.

"Huge amounts of money are put into circulation. In 1985 alone, sports sponsorships brought in \$1.4 billion to the United States, and the total income from professional sports was three billion dollars. Sports brought the most money to the States and it was even more profitable than the oil industry (\$26 billion). The magic triangle of business - sport - TV crosses even the tightest borders... We should not forget that the increase in the number of tournaments and matches, due to commercialization and the demands of the media, can cause audience saturation and thus call existing contracts into question. Finally, the capital inflow into sports has an indisputable impact on the sports stock market." (Kokotović, 2004)

Clubs and professional sports organizations in the world derive their main income not only from participation in competitions and spectators, but also from advertising, sales of TV broadcast rights, transfers of top athletes and sponsorships (in individual cases over 60 % of income). They have their own calculation of the projected income from the sale of the rights, which leads to the starting amount for a bidding. On the other hand, extremely fierce competition in the media market can motivate former rivals to cooperate.

"Even new participants tend to work together with others rather than act independently." Such collusion can transfer market power from sellers to buyers of sports rights, and product innovation can improve the profitability of sports broadcast." (Solberg, Helland. 2011)

Sports are said to be the cornerstone of the TV industry. Although it was only available on national programs and free-to-air commercial channels for a long time, due to its characteristics and strong impact on viewers reflected through strong emotions and identification, it became very attractive for placement on subscription platforms. The progressive globalization of sports fueled by television has led to the consolidation of the world's sports rights markets, which have been bought by broadcast corporations such as America's 21st Century Fox and ESPN, as well as Qatar's beIN Sports. No longer are only rights for placement on the national market granted, but it is in the interest of telecommunications and media corporations to secure rights for all territories where they have users of their services. On the threshold of the 21st century, with the advancement of technologies for the placement of content and the increase of the television market from local, regional and national, from continental to global, through the system of terrestrial transmitters, via cable and satellite distribution to the world's global Internet network, all technical and technological prerequisites are fulfilled so that a sports event that could once only be followed by the audience on the field or a limited number of TV viewers, can now be distributed to every home, to every mobile phone, computer and other "smart" devices.

The largest digital contract of US\$ 500 million was signed in 2015 by the Chinese company Tencent for the rights to broadcast NBA games for five years. Two years later,

Amazon paid US\$ 50 million for digital streaming for the US National Football League (NFL). The very next year, it had to pay another 130 million dollars for two additional seasons. Thursday's matches were available to subscribers of the Amazon Prime Video platform in over 200 countries. By the way, the rights to broadcast matches of the National Football League are the most lucrative and the most expensive sports broadcast rights in the world. Back in March 2021, the NFL released information about contracts with its television partners through to 2033, which are said to be worth a total of US\$ 113 billion. The NFL has ensured that, in case of changes in the media market, which is normally turbulent, it can terminate the contracts at any time after seven years. Broadcast rights are held by CBS, ESPN, NBC and Fox.

"The new deal will make Amazon the sole provider of Thursday Night Football broadcasts." In the previous arrangement, the broadcasts were broadcast on Fox and simultaneously streamed on Prime Video. However, the new deal kicks Fox out, giving the tech giant exclusive rights to broadcast the game on its platform." (Yusuf, 2023)

The vast majority of domestic sports championships are generally broadcast on pay TV channels, and the world's largest on free-to-air (FTA), free TV channels that are available to all viewers in the territory for which the broadcast rights have been acquired. However, there are also cases where the so-called hybrid rights are regulated. This is the case with the rights granted, for example, to broadcasts of the UEFA Champions League, which is broadcast on free and pay TV channels. (Hoehn, 2012)

When licensing broadcast rights, sports organizations and clubs insist on meeting viewership goals. The value of the contract depends on the audience size and increases in the so-called multiplatform environment, and the contract gets entered through a kind of bidding. Some rights holders recognize the advantages of FTA broadcasts and national TV channels have the right of first refusal over cable channels, which are not available to all viewers in the territory. However, when bidding, cable channels often have an advantage when buying because of the higher offered price, which often national broadcasters, media public service in the first place, cannot respond to. This is happening since the expansion of cable sports channels in Serbia as well. In these cases, the classic bidding formula can benefit only the one who sells the rights, since the bidder's net earnings are questionable, and a large number of viewers remain deprived of the possibility of watching TV broadcasts. Practice has shown that it is of interest to the public, as well as the media, to have a partner performance, so, in addition to the placement on the Arena Sport cable channels, for example, the UEFA Champions League matches on Wednesdays can also be watched by viewers of the Radio-Television of Serbia on RTS1. Also, on Thursdays, one match of the UEFA Europa League, by choice. The ratings of these matches is even up to ten times higher than on cable channels. Yet again, the most watched television program in Serbia, for example,

in 2022, but also in the last four years, was the broadcast of the match between Serbia and Brazil at the 2022 World Cup in Qatar (RTS, 2022) with almost three million viewers, and researchers of the British media market state that, for example, at the 2018 World Cup in Russia, as many viewers watched the match England-Tunisia in the group stage via the OTT platform BBC iPlayer, and 18 million viewers via BBC television program. (Hutching, B. Lee, B. Rowe, D. 2019)

The importance of the availability of international sports broadcasts of national importance to the entire population, was also recognized by the Regulatory Authority for Electronic Media (REM), which made a decision on the list of the most important events of special importance for the citizens of the Republic of Serbia, for which free access must be provided on the territory of the entire country. The list includes the most represented international sports events in which the Serbian national teams or Serbian competitors participate. Since the national interest is recognized, support is needed through legislation and its implementation so that the national broadcaster with FTA access on the territory of the entire country has the right of first refusal in purchasing instead of subscription cable channels that are not available to all viewers on the territory of Serbia.

Conclusion

The development of technology in the TV industry has directly influenced strengthening of the bond between sports and television. In an effort to convey the most attractive program content, which sports broadcasts certainly are, to the audience in the best possible way, the TV industry has also developed. Over time, modern viewers have become more and more demanding and their expectations have increased, and media professionals are more ready to use new technical and technological possibilities - work with a larger number of cameras, virtual graphics, server possibilities for playing delayed footage, etc.

Following the details and skillfully using television language, the director puts his personal reflection of objective reality at the service of an authentically mediated sports event with all significant information, atmosphere, emotion and context. The professionalism of the media teams is also reflected in the skill of producing a good TV broadcast, which is a mirror of the development of modern television. It is the prestige, growing importance and value of sports broadcast live, its influence on the development of the sports and media industry in terms of program production and placement, as well as its appeal to an increasingly large audience, that all participants in these two global industries have recognized.

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